

LAST REVISED DATE: 03/21/2018

General Information


Task	Process Information
<p>Cancelling an Express PO (Purchase Order)</p>	<p>Use this tip sheet to cancel an Express Purchase Order under the following circumstances:</p> <ol style="list-style-type: none"> 1) The Express Purchase Order was entered by mistake 2) The Express Purchase Order is a duplicate 3) The Express Purchase Order is required to be canceled by the Purchasing organization. <p>An Express Purchase Order must be in one the following states in order to be canceled:</p> <p><u>An Express Purchase Order is allowed to be canceled when the PO Status is: 'Approved' (whether Budget Checked or not Budget Checked) and there is no activity, or the PO Status is: 'Dispatched' and there is no activity. No activity means the Express PO does not have any receipts or associated vouchers posted against it.</u></p> <p><u>An Express Purchase Order is NOT allowed to be canceled when the PO Status is: 'Dispatched' or 'Approved' and it has had activity.</u></p> <p>The steps and messages will be different when cancelling an Express PO based on what status the Express PO is in prior to cancelling it. These instructions provide the steps to cancel an Express PO for the most common scenarios. If you need to cancel an Express PO which does not fit the most common scenarios, you should call the Procurement Office or complete a Help Desk ticket for further assistance.</p>


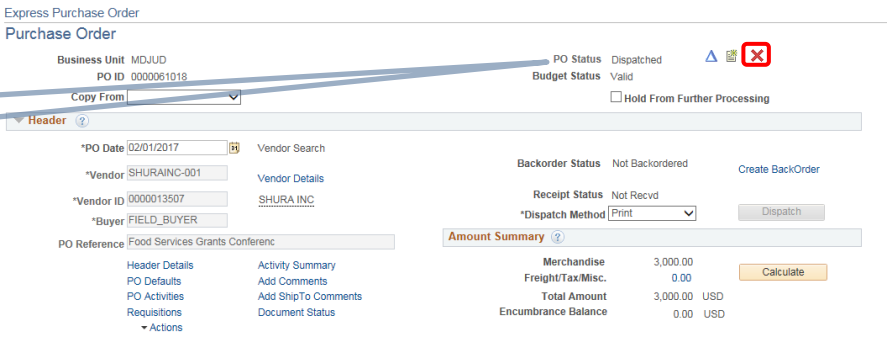
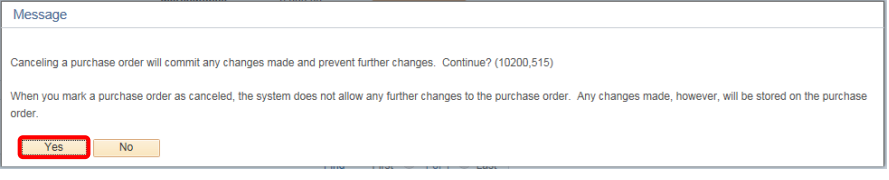
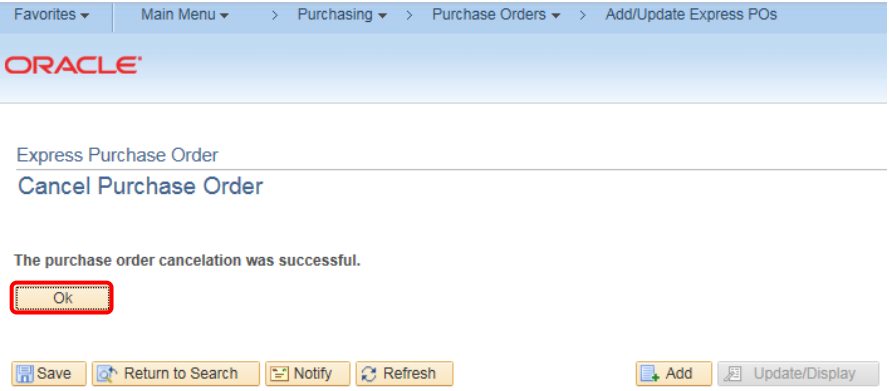
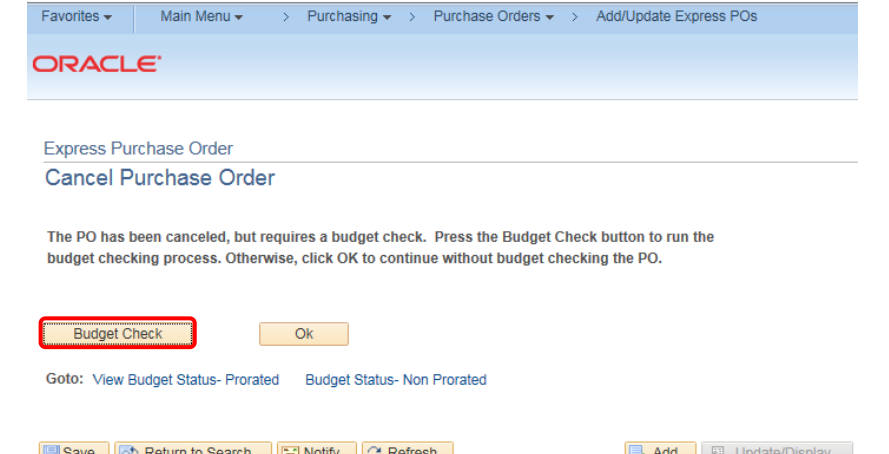
GEARS Navigation

<p>Main Menu > Purchasing > Purchase Orders > Add/Update Express POs</p>	<p>Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update Express POs</p>
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1.0 Process

This document is intended to provide a quick reference to cancelling an Express Purchase Order within GEARS.

STEP	ACTION	DETAILS
1.	Select the "Find an Existing Value" Tab	<p>Express Purchase Order</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p>
2.	Enter you PO ID in the field PO ID:	<p>Express Purchase Order</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>▼ Search Criteria</p> <p>Business Unit = ▼ MDJUD</p> <p>PO ID begins with ▼ </p> <p>Purchase Order Date = ▼ 81</p> <p>PO Status = ▼ ▼</p> <p>Short Vendor Name begins with ▼ 🔍</p> <p>Vendor ID begins with ▼ 🔍</p> <p>Vendor Name begins with ▼ 🔍</p> <p>Buyer begins with ▼ 🔍</p> <p>Buyer Name begins with ▼ 🔍</p> <p>PO Type = ▼ ▼</p> <p>Purchase Order Reference begins with ▼ </p> <p>Hold From Further Processing <input type="checkbox"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search  Save Search Criteria</p>
3.	Click the Search button.	

<p>4.</p>	<p>To cancel this purchase order, click the Cancel PO icon (red X).</p> <div data-bbox="207 289 630 388"> <div>PO Status Dispatched</div> <div>Budget Status Valid</div> <div>  </div> </div>	
<p>5.</p>	<p>A message will be displayed explaining that cancelling a purchase order will prevent any further changes, and asking if you would like to continue.</p> <p>Click the Yes button.</p>	
<p>6.</p>	<p>If your Express PO had a PO Status of 'Approved' but had NOT been budget checked or dispatched, then a message will be displayed explaining that the "The PO cancelation was successful".</p> <p>Click the OK Button.</p>	
<p>7.</p>	<p>If your Express PO had a PO Status of 'Approved' and had been budget checked, but had NOT been dispatched, then a message will be displayed explaining that the "The PO has been canceled, but requires a budget check."</p> <p>Click the Budget Check Button.</p>	

8.	<p>If your Express PO had a PO Status of <u>'Dispatched'</u> but had NOT been received or vouchered, then a message will be displayed explaining that the "PO has 'Pending Cancel' status, but requires a budget check."</p> <p>Click the Budget Check Button.</p>	<div>Express Purchase Order</div> <div>Cancel Purchase Order</div> <p>PO has 'Pending Cancel' status, but requires a budget check. Press the Budget Check button to run the budget checking process. Otherwise, click OK to continue without budget checking the PO. Also, PO has 'Pending Cancel' status. Dispatch PO to set the status to 'Canceled'.</p> <div><div>Budget Check</div><div>Ok</div></div> <p>Goto: View Budget Status- Prorated Budget Status- Non Prorated</p> <div><div>Save</div><div>Return to Search</div><div>Notify</div><div>Refresh</div><div>Add</div><div>Update/Display</div></div>												
9.	<p>If your Express PO had a PO Status of <u>'Dispatched'</u> and had been partially or fully received, then a message will be displayed explaining that the "Line has been received, you may not cancel /line/schedule/distribution."</p> <p>NOTE: This Express PO cannot be canceled, unless the associated Receipts are cancelled.</p>	<div>Favorites Main Menu Purchasing Purchase Orders Add/Update Express POs</div> <div>ORACLE</div> <div>Express Purchase Order</div> <div>Cancel Purchase Order</div> <p>Business Unit MDJUD PO ID 0000061153 Vendor SHURAINC-001</p> <div>Return to Main Page</div> <div>ErrorPersonalizeFindView All1 of 1FirstLast</div> <table><thead><tr><th>Line</th><th>Sched</th><th>Distrib</th><th>Message</th></tr></thead><tbody><tr><td>1</td><td>1</td><td>1</td><td>Line has been received, you may not cancel line/schedule/distribution.</td></tr></tbody></table> <div><div>Save</div><div>Return to Search</div><div>Previous in List</div><div>Next in List</div><div>Notify</div><div>Refresh</div><div>Add</div><div>Update/Display</div></div>	Line	Sched	Distrib	Message	1	1	1	Line has been received, you may not cancel line/schedule/distribution.				
Line	Sched	Distrib	Message											
1	1	1	Line has been received, you may not cancel line/schedule/distribution.											
10.	<p>If your Express PO had a PO Status of <u>'Dispatched'</u> and had been tied to an active Voucher, then a message will be displayed explaining that the "The PO Line is tied to an active Voucher, therefore it may not be cancelled."</p> <p>NOTE: This Express PO cannot be canceled, until all associated Vouchers and Receipts (if any) are cancelled.</p>	<div>Express Purchase Order</div> <div>Cancel Purchase Order</div> <p>Business Unit MDJUD PO ID 0000061018 Vendor SHURAINC-001</p> <div>Return to Main Page</div> <div>ErrorPersonalizeFindView All1-2 of 2FirstLast</div> <table><thead><tr><th>Line</th><th>Sched</th><th>Distrib</th><th>Message</th></tr></thead><tbody><tr><td>1</td><td>1</td><td></td><td>At least one schedule has been matched. Cannot cancel the PO.</td></tr><tr><td>1</td><td>1</td><td>1</td><td>The PO Line is tied to an active Voucher; therefore it may not be canceled.</td></tr></tbody></table> <div><div>Save</div><div>Return to Search</div><div>Previous in List</div><div>Next in List</div><div>Notify</div><div>Refresh</div><div>Add</div></div>	Line	Sched	Distrib	Message	1	1		At least one schedule has been matched. Cannot cancel the PO.	1	1	1	The PO Line is tied to an active Voucher; therefore it may not be canceled.
Line	Sched	Distrib	Message											
1	1		At least one schedule has been matched. Cannot cancel the PO.											
1	1	1	The PO Line is tied to an active Voucher; therefore it may not be canceled.											
11.	<p>To view your Express Purchase Order after you cancel it go to: Main Menu> Purchasing > Purchase Orders > Review PO Information > Purchase Orders - Purchase Order Inquiry page</p>	<div>FavoritesMain MenuPurchasingPurchase OrdersReview PO InformationPurchase Orders</div>												

12.

Enter the PO ID:

Purchase Order Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit

=

MDJUD

PO ID

begins with

Contract SetID

begins with

Contract ID

begins with

Release Number

=

Purchase Order Date

=

PO Status

=

Program Cost Account

begins with

Vendor ID

begins with

Vendor Name

begins with

Buyer

begins with

Buyer Name

begins with

Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

13.

Click the

Search

 button.

14.

If your Express PO had a PO Status of 'Approved', your Express Purchase Order will now have a 'Canceled' PO Status.

Favorites

Main Menu

Purchasing

Purchase Orders

Review PO Information

Purchase Orders

ORACLE

Purchase Order Inquiry

Purchase Order

Business Unit

MDJUD

PO ID

0000061151

PO Status

Canceled

Budget Status

Valid

Header

PO Date

02/21/2017

Vendor Name

SHURAINC-001

Supplier ID

0000013507

Buyer

FIELD_BUYER

PO Reference

Catering Services

Header Details

All RTV

Matching

Vendor Details

Activity Summary

Header Comments

Document Status

Actions

Backorder Status

Not Backordered

Receipt Status

Not Recvd

Hold From Further Processing

Amount Summary

Merchandise

0.00

Freight/Tax/Misc.

0.00

Total

0.00 USD

Encumbrance Balance

0.00 USD

Lines

Personalize

Find

View All

First

1 of 1

Last

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status		
1		Food Services Judiciary Grants	0401		EA	0.00 USD	Canceled		

View Printable Version

Return to Search

Previous in List

Next in List

Notify

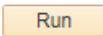
Related Links

15. If your Express Purchase Order had a PO Status of **'Dispatched'**, your Express Purchase Order will now have a **'Pend Cncl'** (Pending Cancel) PO Status, until the Dispatch process is run.

The screenshot shows the Oracle Purchase Order Inquiry interface. At the top, the navigation path is: Favorites > Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. The page title is 'Purchase Order Inquiry' and 'Purchase Order'. The Business Unit is MDJUD, PO ID is 0000061152, and Change Order is 1. The PO Status is highlighted with a red box and labeled 'PO Status Pend Cncl'. The Budget Status is Valid. The Header section shows PO Date 02/21/2017, Vendor Name SHURAINC-001, Supplier ID 0000013507, Buyer FIELD_BUYER, and PO Reference Catering Services. The Backorder Status is Not Backordered, Receipt Status is Not Recvd, and there is a checkbox for 'Hold From Further Processing'. The Amount Summary table shows Merchandise 0.00, Freight/Tax/Misc. 0.00, Total 0.00 USD, and Encumbrance Balance 0.00 USD. The Lines table has one line item: Line 1, Item ID, Food Services Judiciary Grants, Category 0401, PO Qty, UOM EA, Merchandise Amount 0.00 USD, and Status Canceled. At the bottom, there are buttons for Return to Search, Previous in List, Next in List, Notify, and Related Links.

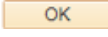
16. Follow the navigation seen on the right to Dispatch your PO.

1. Enter the PO # in the PO ID field.

2. Click 

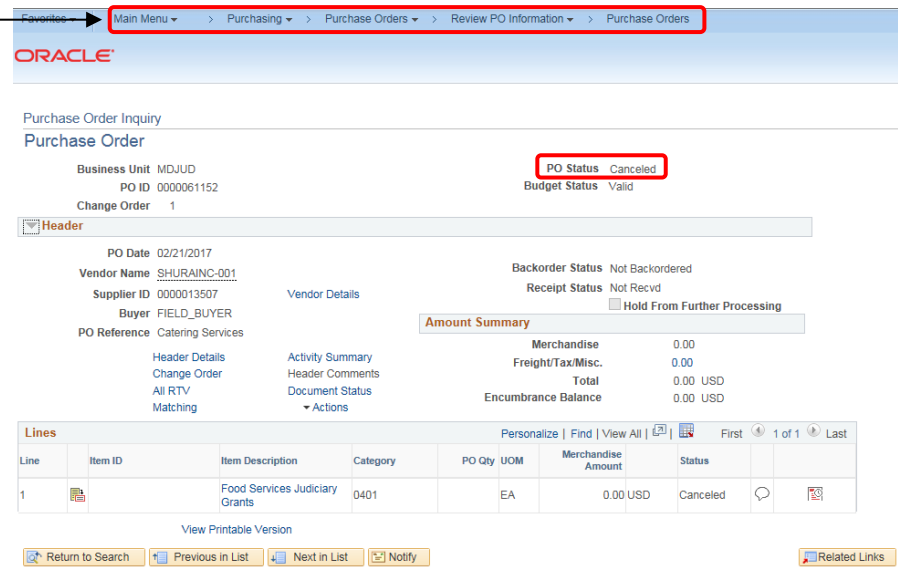
The screenshot shows the Oracle Dispatch POs interface. The navigation path is: Favorites > Main Menu > Purchasing > Purchase Orders > Dispatch POs. The page title is 'Dispatch POs'. The Run Control ID is PS_PO_DISPATCH_DEFAULT, Language is English, and there is a checkbox for 'Specified Language'. The Process Monitor is highlighted with a red box and labeled 'Run'. The Recipient's Language is. The Process Request Parameters section shows Business Unit MDJUD, To, PO ID 0000061152 (highlighted with a red box), PO Status Pending Cancel, Contract Set ID, Contract ID, Release, From Date, Through Date, Vendor ID, Buyer, Fax Cover Page, and Template ID. The Statuses to Include section has checkboxes for Approved, Dispatched, and Pending Cancel. The Dispatch Methods to Include section has checkboxes for Print, E-Mail, FAX, and EDX. The Miscellaneous Options section has checkboxes for Print Changes Only, Test Dispatch, Print Copy, Exclude POs tied to Authored Contract Documents, Print BU Comments, Print PO Item Description, and Print Duplicate. The Sort By dropdown is set to Sort by Line Number. At the bottom, there are buttons for Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

17. On the next page, choose PO Dispatch/Print.

Then click 

The screenshot shows the Oracle Process Scheduler Request interface. The User ID is LYNN.WOYTKO and the Run Control ID is PS_PO_DISPATCH_DEFAULT. The Server Name, Recurrence, and Time Zone are dropdown menus. The Run Date is 02/21/2017 and the Run Time is 1:09:05PM. There is a button for 'Reset to Current Date/Time'. The Process List table has the following rows: PO Dispatch & Email (PODISP, PSJob, (None), (None), Distribution), PO Dispatch/Print (POPO005, SQR Report, Web, PDF, Distribution), PO BI Publisher Dispatch (POXMLP, PSJob, (None), (None), Distribution), and Email (PO_PO_EMAIL, Application Engine, Web, TXT, Distribution). The 'PO Dispatch/Print' row is selected with a checkmark. At the bottom, there are buttons for OK and Cancel.

18. Once the Dispatch process is complete, navigate to the **Review PO Information -> Purchase Orders** page to confirm the status of 'Canceled' of the PO.



The screenshot displays the Oracle Gears interface for a Purchase Order Inquiry. The breadcrumb trail at the top indicates the navigation path: Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. The PO Status is highlighted as 'Canceled'. The PO ID is 000061152, and the Budget Status is 'Valid'. The PO Date is 02/21/2017, and the Vendor Name is SHURAINC-001. The Supplier ID is 000013507, and the Buyer is FIELD_BUYER. The PO Reference is Catering Services. The Amount Summary shows Merchandise at 0.00, Freight/Tax/Misc. at 0.00, Total at 0.00 USD, and Encumbrance Balance at 0.00 USD. The Lines table shows one line item: Food Services Judiciary Grants, Category 0401, PO Qty EA, Merchandise Amount 0.00 USD, and Status Canceled.

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		Food Services Judiciary Grants	0401		EA	0.00 USD	Canceled



End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.